Task Order 110 –
FP Data Mart Operations

FP Data Mart Operations Monthly SLA Metrics Report
Deliverable 110.1.1d

Period Ending: 09/30/02

FEDERAL STUDENT AID

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Task Order 110 – FP Data Mart Operations

Introduction

This is the September monthly report for Task Order 110 Data Mart Operations. The purpose of this task order is to provide the capability to sustain the FP Data Mart. The report information will be provided separately for each system.

FP Data Mart Availability for Production

**Note: Downtime for backups and scheduled outages are not shown

Date	Availability (%)	Notes
Sun - September 1	100%	
Mon - September 2	100%	
Tues - September 3	100%	
Wed - September 4	100%	
Thurs – September 5	100%	
Fri - September 6	100%	
Sat - September 7	100%	
Sun - September 8	100%	
Mon - September 9	100%	
Tues - September 10	100%	
Wed - September 11	100%	
Thurs - September 12	100%	
Fri - September 13	100%	
Sat - September 14	100%	
Sun - September 15	100%	
Mon - September 16	100%	
Tues - September 17	100%	
Wed - September 18	100%	
Thurs - September 19	100%	
Fri - September 20	100%	
Sat - September 21	100%	
Sun - September 22	100%	
Mon - September 23	100%	
Tues - September 24	100%	
Wed - September 25	100%	
Thurs - September 26	100%	
Fri - September 27	100%	
Sat - September 28	100%	

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Date	Availability (%)	Notes
Sun - September 29	100%	
Mon - September 30	100%	

FP Data Mart Operations Status

Work Accomplished During This Period

- Completed monthly FP load for August with data feeds from FFEL, NSLDS, PEPS, and FMS.
- Provided daily monitoring of FP data mart availability.
- Continued tracking SIRs and enhancement requests.
- Continued to update user login information (add, remove, and reset IDs).
- Completed Data Mart Migrations for FP.
- Held bi-weekly FP Meetings with Power Users.
- Assisted Power Users with MicroStrategy report creation.
- Developed and amended mappings in Informatica to provide data to MicroStrategy reports.

Issues or Anticipated/Current Problems

- Security Issue regarding data filters within Microstrategy. Continuing to work with Microstrategy to ensure a permanent fix within the current version (7.1.3) as well as the new version (7.2.1, also known as 7i).

Planned Work for Next Period

- Continue MicroStrategy reporting enhancements and completion of outstanding SIRs.
- Continue to provide daily monitoring of FP Data Mart.
- Continue to update user login information (add, remove, and reset IDs).
- Continue issue resolution for open FP requests.
- Complete September FP monthly data load.
- Continue transition for upgrade to MicroStrategy 7i. Currently on hold due to some priority SIRs that need to be migrated to Production prior to the upgrade.

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Help Desk Monthly Throughput (FP)

Change Request

Category	High	Medium	Low	Total
Carry Forward	4	8	1	**13**
New	0	5	0	**5**
Closed	3	3	1	**7**
End of Month Balance	**1**	**10**	**0**	**11**

Data Request

Category	High	Medium	Low	Total
Carry Forward	0	0	0	**0**
New	0	2	0	**2**
Closed	0	0	0	**0**
End of Month Balance	**0**	**2**	**0**	**2**

Help Desk Request

Category	High	Medium	Low	Total
Carry Forward	0	0	0	**0**
New	2	0	0	**2**
Closed	2	0	0	**2**
End of Month Balance	**0**	**0**	**0**	**0**

Note: SIRs in POSTPONED status are not reflected in these numbers

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Help Desk Request Summary (FP)

Total Requests: 35

ID	STATE	TYPE OF REQ	TITLE	Priority	OPEN	CLOSED
261	Postponed	Change Request	Page-by area not working as expected	2. Medium	6/4/2001	
262	Postponed	Change Request	Search for Lender by name	1. High	6/4/2001	
259	Postponed	Change Request	Drill to multiple templates in report - E32	3. Low	7/28/2001	
264	Postponed	Change Request	Subtotals appearing at top of Report	3. Low	2/21/2002	
265	Postponed	Change Request	We need to use dynamic quarter prompts	3. Low	2/22/2002	
267	Postponed	Change Request	Correct/add parent Lender name, city and state	2. Medium	6/3/2002	
219	Ready_for_Approval	Change Request	Lender Scorecard document metric changes	2. Medium	7/10/2002	
224	Closed	Change Request	Have calculation defined in report "Lender Delinqu	3. Low	7/15/2002	9/3/2002
225	Closed	Change Request	Changes to Lender Portfolio Percentage by GA Repor	2. Medium	7/16/2002	9/3/2002
229	Postponed	Change Request	Changes to Lender Capitalized Interest report	2. Medium	7/23/2002	
235	Closed	Change Request	Add GA-lender relationship	1. High	7/24/2002	9/17/2002
236	Closed	Change Request	GA Delinquency Aging data problem	2. Medium	7/24/2002	9/3/2002
237	Closed	Change Request	Apply proper permissions to GA groups.	1. High	7/24/2002	9/3/2002
240	Closed	Change Request	Changes to LSC Report	2. Medium	7/26/2002	9/3/2002
253	Assigned	Change Request	1.2.6 GA Fee Payments	2. Medium	7/30/2002	
254	Assigned	Change Request	1.2.6.1 GA Requested and Paid Fees	2. Medium	7/30/2002	
255	Assigned	Change Request	1.2.7 GA Fee Payments History Report	2. Medium	7/30/2002	
283	Assigned	Change Request	Add Graphs to FP Rel 2 Reports	2. Medium	8/20/2002	
284	Postponed	Change Request	Alert users about most recent load date	2. Medium	8/20/2002	
286	Closed	Change Request	Change report location and visibility	1. High	8/22/2002	9/3/2002
291	Assigned	Change Request	Modify Trigger Rate Metrics	1. High	8/28/2002	
293	Ready_for_Approval	Change Request	Modify Extract Date Prompt: Maximum of one date	2. Medium	9/9/2002	
294	Ready_for_Approval	Change Request	Create Award Year Attribute	2. Medium	9/9/2002	
296	Ready_for_Approval	Change Request	Change Lender Servicer Portfolio Report	2. Medium	9/10/2002	
299	Assigned	Change Request	Modify the Select Quarter prompt	2. Medium	9/12/2002	
302	Ready_for_Approval	Change Request	Add records to lkp_srvcr	2. Medium	9/16/2002	
282	Assigned	Data Request	Needs to insert manual VFA performance data	2. Medium	8/20/2002	
287	Assigned	Data Request	GA Closed School and False Certification Claim	2. Medium	8/26/2002	
260	Postponed	Help Desk Request	Data Mart users lose access when NT patches are in	3. Low	7/18/2001	
263	Postponed	Help Desk Request	Login before projects are displayed	1. High	9/6/2001	
266	Postponed	Help Desk Request	No Limit for login attempts	3. Low	3/4/2002	

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ID	STATE	TYPE OF REQ	TITLE	Priority	OPEN	CLOSED
268	Postponed	Help Desk Request	Automated Report to check for GA Access Violation	2. Medium	6/17/2002	
269	Postponed	Help Desk Request	Drilling Problem	1. High	7/15/2002	
292	Closed	Help Desk Request	Reset Password for Constantino Conte	1. High	9/6/2002	9/6/2002
303	Closed	Help Desk Request	Create User ID's	1. High	9/20/2002	9/20/2002

Help Desk Request Details (FP)

Total Records: 35

ID: MPOps00000213
Title: OCIO Password Requirements not met

State: Closed
Priority: 3. Low
Open: 7/19/2002 2:48:36PM
Target Date: 7/21/2002 4:00:00A
Requestor: Willie Sutton, 202-377-3320
Assigned to: Tina Liu, 202-962-0726

Description:
Password requirements do not adhere to the minimum OCIO requirements in terms of length and composition (8 characters consisting of 1 capital and 1 numeric character)

Microstrategy Case #160279

Password requirements passed in production. In the 7i version, it would nice to get an expiration warning like:

"Your password has expired. Please change it to be 8 - 14 characters long, with 3 of the following 4 combinations: numbers, uppercase alphabets, lowercase alphabets and special characters (except @ and ").

Activity Log:
===== State: Ready_for_Approval by:tliu at 7/24/02 11:57:39 AM =====

Migrated to production on Sunday 7/21/02. Once FP power users (Nettie) prove it, we can close the issue.
===== State: Opened by:tliu at 7/19/02 10:53:47 AM =====

7/1/02 (T.Liu): Added customization code to the asp file: ChangePasswordCuLib.asp. Implemented in dev/test web server. Will migrate to production on 7/21/02.

ID: MPOps00000214
Title: Security filter applies to calculating total amoun

State: Closed
Priority: 1. High
Open: 6/11/2002 7:00:00PM
Target Date: 7/21/2002 4:00:00A
Requestor: Tina Liu, 202-962-0726
Assigned to: Tina Liu, 202-962-0726

Description:
Security filter filters out data to calculate total amount. For example, for the GA Federal Fund report, the "% of Total Federal Fund Ending Balance" will become 100% for invidual GA report with the security filter filering out other GA data.

Activity Log:
===== State: Assigned by:tliu at 8/5/02 10:23:46 AM =====

8 test GA IDs have been created and applied to both test and production projects: 706*, 708, 712*, 713, 717*, 725*, 755, 800.(the IDs identified with an asterick have the "view all" access to public GA reports).

===== State: Opened by:tliu at 7/19/02 11:02:57 AM =====

6/18/02 (T.Liu): MSTR tech support suggested tech note: TN4000-071-0307 for this case, but it only applies to total calculation that
is based on the parent attribute of the child attribute that is filtered by security filter.

6/28/02 (T.Liu): FP power users want to allow GA see all other GA's data for some reports. Tried to implement a "fake" parent
of GA to achieve the goal of ignoring security filter setting for some reports but it did not work. Will discuss another simple solution: having an individual ID and a group ID for every GA. The group ID will be the same that can be used to view public
GA reports, while the individual ID should be used to access any other report with security filter applied.

ID: MPOps00000215

Title: Export size limit

State: Closed

Priority: High

Open: 7/19/2002 3:06:10PM

Target Date: 7/21/2002 4:00:00A

Requestor: Susan Haenel-Beck, 917-767-6435

Assigned to: Tina Liu, 202-962-0726

Description:
Users are having a problem with the size of a report and exporting it to Excel. One of the reports, Shared Reports>ED 799 Reports>Part IV is too large to export. I think the maximum needs to be reset as Part IV reports would traditionally be larger due to the numerous adjustments that are usually made. What is the maximum report size to export and how can we change/elminate this?

Activity Log:
===== State: Opened by:tliu at 7/19/02 11:08:31 AM =====

7/1/02 (T.Liu): Opened the SIR and sent email to Susan asking for detail. Susan replied asking me to call her.
Susan called with the following information: Lender ID: 831821,832095,833347. Select time period from March 1997 till present. Applied the following fix to test project:
1. Set the project server configuration on SFANT001 -> Governing -> Maximum number of XML Cells: 5000
2. Change the Web server request time out to be 2100 (s)
3. Change the export preference (Project Default) setting to be:
   Maximum number of rows to export to plain text: 50000
   Maximum number of rows to export to Excel with plain text or Lotus with plain text: 30000
   Maximum number of rows to Excel with or without formatting or to HTML: 20000

Need VDC support in order to change on production web server. Sent email to Susan about current status. The web user who
needs to export the report may use test project for now.

7/17/02 (T.Liu): Got email from Susan who forwarded email from Voltaggio, Nicholas:

I ran the report. It took a half hour, but everything was fine. I was able to hide the totals and after I drilled to my liking everything downloaded fine. They did a good job on this.

ID: MPOps00000216 **Title:** Total not calculated correctly

State: Closed **Priority:** 1. High
Open: 7/19/2002 3:18:19PM **Target Date:** 7/21/2002 4:00:00A
Requestor: Nettie Harding, 202-377-3307

Assigned to: Lisa Phillips, 202-962-0724

Description:
Nettie reported a problem with the total calculation on the report <Default Dollars Paid to Lenders>. The total is much bigger
than it should be.

Activity Log:
===== State: Opened by:tliu at 7/19/02 11:19:47 AM =====

7/2/02 (T.Liu): Found out that the problem will occur after having the "Rank" columns in the report. Reassigned to Lisa to continue working on it.

7/2/01(LP): Determined that the rank metrics needed to match the break by for the report. Sent e-mail to Nettie:
Nettie,

I have been working on the request for updating the Default Dollars Paid to Lenders report to fix the totals problem. We have
determined that the totals are incorrect because the metric was on the break by for Quarter (Ending Date) while the report was
on the page by for Fiscal Year. I have updated the report in Dev under the /GA Data Book directory, so that the metrics have
been updated correctly. If you would prefer the report to page by Quarter (Ending Date) we can do this as well. (The other reports in the /GA Data Book directory are page by Quarter(Ending Date)).

You can view the report with the page by for Fiscal Year under the Reports/GA Data Book/Default Dollars Paid to Lenders or
you may view the report with the page by for Quarter (Ending Date) under the Reports/Enhancement/ID466/Default Dollars
Paid to Lenders folder. These are both on the DEV environment.

After you have reviewed both reports, let me know what you prefer and we will ensure that the report will be migrated next Sunday. .

Thanks!

Lisa

ID: MPOps00000217 **Title:** Comments from power users

State: Closed **Priority:** 2. Medium
Open: 7/1/2002 3:23:19PM **Target Date:** 8/5/2002 4:00:00AM
Requestor: Nettie Harding, 202-377-3307

Assigned to: Tina Liu, 202-962-0726

Description:
Nettie send the following email:

>GA Federal Fund Report--Limit the list for the GA
> attribute. Exclude the
> following GAs from the report: 611, 620, 627, 631,
> 654, 656, 702, 718, 724,
> 728, 732, 772, 778, 804, 815, 948, 984, 985, and
> 989. These GAs had no
> Federal Fund during the period specified.
>
> GA Restricted Account Report--Limit the list for the
> GA attribute to exclude
> the following GAs: 731, 927, and 951.
>
> I am still working in production and will
> periodically send you my comments.
>
> The following reports under my name in the Release
> 2 Working Folder for
> Power Users is ready to be migrated to test:
>
> 1.2.10
> 1.2.11
> 1.2.12
> 1.5.2
>

Activity Log:
===== State: Ready_for_Approval by:tliu at 7/31/02 3:06:55 PM =====

Discussed with DMIT group, fixed the dollar sign format and added year attribute at page-by level for report GA Annual Report. Ready for production migration.
===== State: Opened by:tliu at 7/19/02 11:25:54 AM =====

7/8/02 (T.Liu): Sent email to Nettie:

Hi Nettie,

Please check to see our action below your individual comment:

--- "Harding, Nettie" <Nettie.Harding@ed.gov> wrote:
> As we discussed earlier here are a few comments on
> the reports in
> Production:
>
> In the GA Analysis Reports:
>
> Default Dollars Paid to Lenders--the total line is
> miscalculating.
>
This is logged as a SIR 466. Lisa has provided a couple of solutions and sent out an email notifying you about her fix. Please

let us know your feedback at your earliest convenience.

> GA Federal Fund Report--Limit the list for the GA
> attribute. Exclude the
> following GAs from the report: 611, 620, 627, 631,
> 654, 656, 702, 718, 724,
> 728, 732, 772, 778, 804, 815, 948, 984, 985, and
> 989. These GAs had no
> Federal Fund during the period specified.
>
It has been applied to both test and dev projects. Please check to see if it is correct.

> GA Restricted Account Report--Limit the list for the
> GA attribute to exclude
> the following GAs: 731, 927, and 951.
>
It has been applied to both test and dev projects. Please check to see if it is correct.

> I am still working in production and will
> periodically send you my comments.
>
>
>
> The following reports under my name in the Release
> 2 Working Folder for
> Power Users is ready to be migrated to test:
>
> 1.2.10
> 1.2.11
> 1.2.12
> 1.5.2
>
Those four reports have been migrated to test project under Form 2000 subfolder. I have done some small improvement on those reports. Please verify those reports at your earliest convenience. You may see some objects still remain in your personal folder, they are not used by those four reports, feel free to delete them. One thing that I noticed but have not changed is for GA Annual Report (1.2.12), none of the metrics are shown in dollar format. Do you want me to change them to be in dollar format?

ID: MPOps00000218

Title: Metadata problems in production project

State: Closed

Priority: High

Open: 7/19/2002 3:32:25PM

Target Date: 7/21/2002 4:00:00A

Requestor: Tina Liu, 202-962-0726

Assigned to: Tina Liu, 202-962-0726

Description:
Fact table F_LEAP_SLEAP_AWRD, LKP_SCH_BRNCH_STATUS, and F_GA_RFND did not get migrated correctly. Metadata contains invalid names for those tables.

Activity Log:

===== State: Opened by:tliu at 7/19/02 11:33:49 AM =====

7/2/2002 (T.Liu): Opened the SIR. Need to submit a CR for remigrating the schema and application objects related to those three corrupted tables. No immediate threat to the data mart because the corruption is not very serious (Table names are messed up). Suggested fixing steps:
1. Remigrate the attributes related to those tables from test to production.
2. If #1 does not prove to work, then we will have to delete all related objects (including application and schema objects) from production and then remigrate everything related from test project to production.
3. Verify the schema objects have been migrated completely.
4. Update schema on production project.
5. Run ScanMD over production metadata to fix any potential problems.

7/3/2002 (T.Liu): Found similar problems in FP Dev project. Manually fixed various fact names bearing a bunch of "?" as the name. But two tables cannot be fixed: D_GA_CITIES, F_SOA_ACTVY_SUMMARY. Ran ScanMD, which cannot fix the problem (it did not even detect the problem). Logged a MSTR Tech support case #174015. Duplicated both test and production projects (schema objects only for production project) and send it to MSTR tech support to debug.

7/8/02 (T.Liu): Got email from MicroStrategy Tech Support:
"

Ms. Liu,

I am contacting you in regards to case 174015. The case description may be found below. As far as this case is concerned, please try and remove the 3 tables from the warehouse catalog and readd them back to see if that helps fix the problem. After re-adding the tables, try saving your changes. Make sure that when you remove your tables from the right side to the left side, that you do not 'save and close' the warehouse catalog, otherwise you will loose all your dependent objects. After moving them to the left, just move them over back to the right and see if that helps. Also, what database are you using for your warehouse? Would it be possible to send me your DDL scripts so that I can try and recreate the issue from my end? Thank you.
"

Tried the proposed solution but it did not work. Sent response via the web interface back to MSTR tech support and uploaded the scripts for creating release 2 tables on MSTR download site. Tech support may use the scripts to create release 2 tables and hence re-produce our problem at warehouse catalog level.

Got phone call from Tech support and went through some possible fix together, no positive result. Tech support said that this may have something to do with our current MicroStrategy I-server version because he has seen similar issues before. We should upgrade to 7i . In 7i release, tables can be migrated the same way as other schema objects, but current version only attributes or facts can be migrated between projects, which tables are migrated implicitly along with dependent attributes and/or facts. If no "shortcut" can be found to solve this issue, the following steps can be done (It is simpler than the orginally proposed fixing steps logged in 7/2/2002):

1. Create temp tables that have the same table structure as the problematic tables.
2. Load temp tables into the project and have all the attributes/facts that are dependent on the problematic tables dependent on the temp tables as well.
In this case, removing problematic tables will not cause a delete over all other dependent objects.
3. Remove problematic tables from the warehouse catalog.
4. Migrate all schema objects that are dependent on the removed problematic tables from test to production and dev projects.
This will bring the correct tables back to the catalog.
5. Remove temp tables from the warehouse catalog.
6. Update schema.

ID: MPOps00000219 **Title:** Lender Scorecard document metric changes

State: Ready_for_Approval **Priority:** 2. Medium
Open: 7/10/2002 7:00:00PM **Target Date:** 8/5/2002 4:00:00AM
Requestor: Tina Liu, 202-962-0726 **Assigned to:** Tina Liu, 202-962-0726

Description:
Part II: change metric name "Trigger" to "Risk".
Score Dictionary: Change "Trigger Indicator" to "Risk Indicator", replace each occurance of "TRIGGER" in the metric value to be "HIGH".

Activity Log:

===== State: Ready_for_Approval by:smcconaghie at 9/17/02 12:39:35 PM =====

9/17/2002 (S. McConaghie): Nettie tried to schedule meeting w/Johan to discuss. These are not viewable by the community, and
they done think that the ?trigger? vs. ?risk? verbiage really matters. Nettie will continue to follow up w/Johan to decide on appropriate verbiage.
===== State: Opened by:tliu at 7/19/02 11:38:14 AM =====

7/10/2002 (T.Liu): Opened the SIR and created a separate document and dependent reports/metric in enhancement folder ID473. Sent email to Nettie for comments.

ID: MPOps00000222 **Title:** Export to Excel gets error message

State: Closed **Priority:** 2. Medium
Open: 7/15/2002 7:00:00PM **Target Date:** 8/5/2002 4:00:00AM
Requestor: Ben Chiu, 415-556-4136 **Assigned to:** Mark Mandrella, 202-962-0721

Description:

User reported the problem with exporting a report to Excel workbook. He would get a popup message box stating the following message (user can choose to ignore the message and continue without any problem though):
Microsoft Excel cannot access the file 'http://fp-mart.sfa.ed.gov/microstrategy7/Export.asp?5_15_51PM.AnnualReport_FinancialFundStmt'. There are several possible reason:
The file name or path does not exist.
The file you are trying to open is being used by another program. Close the document in the other program and try again.
The name of the workbook you're trying to save is the same as the name of another documetn that is read-only. Try saving the
workbook with a different name.

Activity Log:

===== State: Assigned by:mmandrella at 7/31/02 2:23:59 PM =====

I am closing this SIR, because I think it is safe to assume that the problem is with the Office Service Pack installation. The SIR can be reopened if this solution (installing the Service Pack) does not work for all users.

===== State: Assigned by:mmandrella at 7/29/02 11:09:33 AM =====

Ben replied that his error went away after he installed service pack 1 for Office 2000 - same as Jerry. So, he will make sure all users upgrade to this SP and the error will probably go away.

===== State: Assigned by:mmandrella at 7/29/02 10:50:22 AM =====

Summary Thusfar:

1. Jerry Wallace does not get problem anymore after upgrading to IE 6.0.2600.000 Service Pack I. Also does not get error on Netscape 4.08.
2. Susan Haenel-Beck does not get problem on IE 5.50.4522.1800. She was getting error on an older machine.
3. Ben Chiu gets error with version 6.0.2600.000, but it is unclear if he has Service Pack 1 installed. Waiting for him to verify this.

===== State: Assigned by:mmandrella at 7/24/02 10:41:52 AM =====

Spoke with Ben Chiu. There is one version of IE 6 that works for him (Windows XP) and one version (on Windows 2000) that
gives the error. He will send me the exact versions of those browsers, along with version numbers of IE 5.5 that are giving the
errors.

===== State: Assigned by:mmandrella at 7/23/02 2:01:57 PM =====

Ben Chiu called me and said he is not getting the error with IE 6 at home, but IS getting the error at work with IE 6. Also, people in his office with IE 5.5 are getting the error.

===== State: Opened by:tliu at 7/19/02 11:50:13 AM =====

7/16/02 (Mark M): I could not duplicate the problem, so I contacted Ben Chiu via email to set up a time to try to work it through with him. He responded saying he was out of the office for the week, and will contact me upon returning. In the

meantime, Susan Haenel-Beck reported a similar Excel problem. So, I am going to work with her on her problem and see it the
resolution can resolve Ben's.

ID: MPOps00000224 **Title:** Have calculation defined in report "Lender Delinqu

State: Closed **Priority:** 3. Low
Open: 7/15/2002 7:00:00PM **Target Date:** 8/5/2002 4:00:00AM
Requestor: Susan Haenel-Beck, 917-767-6435
Assigned to: Tina Liu, 202-962-0726

Description:
Susan wants to include the calculation of the delinquency rate metrics in the report "Lender Delinquency Rate".

Activity Log:
===== State: Ready_for_Production by:tliu at 8/20/02 1:49:59 PM =====

Susan notified us that she has approved it during the FP client meeting (8/20/02). Applied changes on dev report "SI#4 Delinquency Rate". Will migrate to test and then production together with SIR #240.
===== State: Opened by:tliu at 7/19/02 11:56:07 AM =====

7/15/02 (T.Liu): Opened the SIR. Checked current report format and found out that the metrics we have are named as such:

Past Due (799:VI)
Repay (799:VI)
Delinquency Rate

Set the above metric alias to be the following:

Total Amount of Delinquent Loans (799:VI:3b to 3h)
Total Amount of Loans in Repyament (799:VI:3a to 3h)
Delinquency Rate (Total Amount of Delinquent Loans / Total Amount of Loans in Repayment)

Saved the new version in enhancement folder and sent email to Susan and Nettie for comments.

ID: MPOps00000225 **Title:** Changes to Lender Portfolio Percentage by GA Repor

State: Closed **Priority:** 2. Medium
Open: 7/16/2002 7:00:00PM **Target Date:** 8/5/2002 4:00:00AM
Requestor: Tina Liu, 202-962-0726
Assigned to: Al Bradley, 202-962-0661

Description:
Please make the following changes on the Lender Portfolio Percentage by GA report:

1) Delete the "Total GA Portfolio" metric
2) Add a total row at the bottom of the report. Do not total the "Rank" metric.

Activity Log:

===== State: Verify_Migration by:tliu at 8/19/02 10:00:09 AM =====

The DMIT group meeting has been canceled. Mark verified the report and it has been migrated to production on 8/18/02.
===== State: Ready_for_Approval by:tliu at 8/14/02 10:35:53 AM =====

The change has been applied to both dev and test projects, will discuss with power users about verification on 8/14/02 DMIT
group meeting.
===== State: Assigned by:tliu at 8/7/02 2:11:13 PM =====

DMIT group wants to include a filter on Loan Status for the following codes: DA, FB, IA, ID, IG, IM, RF, RP, UA

===== State: Opened by:tliu at 7/19/02 12:00:47 PM =====

7/16/02 (T.Liu): Changes have applied to both dev and test FP projects. Since our test project includes GA 555 that does not have corresponding lookup entry, so the total percentage does not add up to 100% (because GA 555 is not showing up on the report but it is taken into the calculation of the total). Need to ask DMIT group about whether or not getting rid of GA 555 from the fact table.

7/17/02 (T.Liu): Informed DMIT group about the situation, they will discuss over this.

ID: MPOps00000228
Title: Change to Lender Scorecard>Loan Purchases

State: Closed
Priority: 3. Low
Open: 7/23/2002 3:51:14PM
Target Date: 8/5/2002 4:00:00AM
Requestor: Susan Haenel-Beck, 917-767-6435
Assigned to: Tina Liu, 202-962-0726

Description:
On the Lender Purchases report, one of the column headings has the percentage of purchase to the total portfolio. The percentage column has a reference to the 799 - "(799:V)". This reference should be removed as the number is calculated by the data mart and does not come from the 799.

Activity Log:
===== State: Assigned by:tliu at 7/23/02 11:55:24 AM =====

Changed it on dev and test projects, will migrate it to production on 8/4/2002.

ID: MPOps00000229
Title: Changes to Lender Capitalized Interest report

State: Postponed
Priority: 2. Medium
Open: 7/23/2002 3:56:58PM
Target Date:
Requestor: Susan Haenel-Beck, 917-767-6435
Assigned to: Tina Liu, 202-962-0726

Description:
I need to make a minor change to the Lender Capitalized Interest report. Is there way we can drill to a total for each quarter (i.e., remove the loan type)? I've tried but with no luck.

Activity Log:

===== State: Postponed by:tliu at 8/7/02 11:05:12 AM =====

Susan wants us to postpone this request since MSTR 7i release will have support to this drill capability without any modification on the report.

===== State: Assigned by:tliu at 7/23/02 1:24:04 PM =====

Sent email to Susan:

There are two ways to implement this: 1. add a subtotal for each quarter (it will sum up every loan type in that quarter) directly
on the report, no drill needs to be done. 2. add a metric for calculating the total not grouping by the loan type. The metric will
not show up on the report, but you will be able to drill to it.
Which way you prefer?

Note that if we want to remove "Loan Type" from the report, new template needs to be created.

===== State: Opened by:tliu at 7/23/02 12:01:37 PM =====

Sent email to Susan:

There are two ways to implement this: 1. add a subtotal for each quarter (it will sum up every loan type in that quarter) directly
on the report, no drill needs to be done. 2. add a metric for calculating the total not grouping by the loan type. The metric will
not show up on the report, but you will be able to drill to it.
Which way you prefer?

ID: MPOps00000230 **Title:** Add a total column to Lender Sales report

State: Closed **Priority:** 2. Medium
Open: 7/23/2002 5:29:08PM **Target Date:** 8/5/2002 4:00:00AM
Requestor: Susan Haenel-Beck, 917-767-6435
Assigned to: Mark Mandrella, 202-962-0721

Description:
Susan wants to add a metric column to the Lender Sales report for the total of Beginning Principal Balance and Disbursements.

Activity Log:
===== State: Needs_Clarification by:tliu at 7/24/02 2:17:10 PM =====

On DMIT meeting:

Replace the existing two columns with one column, give it a name: Total Beg.Bal+Disb.

===== State: Assigned by:tliu at 7/23/02 1:39:06 PM =====

Sent email to Susan:

As long as DMIT group agrees upon this, we will add another column. Please give us a suitable column name for this new metric.

ID: MPOps00000235 **Title:** Add GA-lender relationship

State: Closed **Priority:** 1. High

Open: 7/24/2002 3:50:08PM **Target Date:** 8/5/2002 4:00:00AM
Requestor: Nettie Harding, 202-377-3307
Assigned to: Tina Liu, 202-962-0726

Description:
In order to allow GA see some lender data (only those lenders that the corresponding GA services), we need to add a GA-lender
parent-children relationship plus the supporting relationship table in the warehouse.

Activity Log:
===== State: Assigned by:tliu at 7/31/02 1:07:45 PM =====

The relationship table and related schema change has been applied to test project as well.

===== State: Opened by:tliu at 7/24/02 11:53:36 AM =====

The relationship table has been created and populated with NSLDS data in all three warehouses. Dev project has added the GA-lender relationship at the schema level (loaded the table GA_LNDR_MAP into the data mart) and has been tested with a sample GA ID.

ID: MPOps00000236 **Title:** GA Delinquency Aging data problem

State: Closed **Priority:** 2. Medium
Open: 7/24/2002 4:00:45PM **Target Date:** 8/19/2002 4:00:00A
Requestor: Tina Liu, 202-962-0726
Assigned to: Al Bradley, 202-962-0661

Description:
1. The report "GA Delinquency Aging" (Req#1.2.8) the calculation of "Total Delinquent Defaulted Loans" is based on MR_32(Ending Balance on Defaulted Loans) - MR_33(Not Delinquent), which is not the same as the sum of MR_34 through MR_40. Example GA ID: 729, Fiscal Year: 2001, Quarter (Ending Date): 2001 March 31.
2. Need to add a blank space after "," before the description for MR_32 to MR_40.

Activity Log:
===== State: Verify_Migration by:tliu at 8/19/02 10:02:04 AM =====

The DMIT group meeting has been canceled, Mark verified the report and it has been migrated to production on 8/18/02.
===== State: Ready_for_Approval by:tliu at 8/14/02 10:50:46 AM =====

The change has been applied to dev and test projects. Will discuss the verification with DMIT group on the meeting 8/14/02.
===== State: Assigned by:tliu at 8/7/02 2:05:03 PM =====

On DMIT group meeting, got the answer to exclude "Other" from calculating ending balance on defaulted loans.

===== State: Needs_Clarification by:tliu at 8/7/02 11:19:26 AM =====

Found out that the reason for this problem is that when calculating the ending balance on defaulted loans (MR_32), we sum up
all three categories: Principal, Interest, and Other. But for MR_33 - MR_40, there are only principal and interest amounts available. If not counting the "Other" amount for MR_32, then the result should match each other. Needs to verify how we shall calculate the ending balance on defaulted loans.

ID: MPOps00000237 **Title:** Apply proper permissions to GA groups.

State: Closed
Open: 7/24/2002 7:35:33PM
Requestor: Nettie Harding, 202-377-3307

Priority: 1. High
Target Date: 8/5/2002 4:00:00AM

Assigned to: Tina Liu, 202-962-0726

Description:
Nettie sent a file containing the GA view permission setting for every report. We need to apply the setting to our FP data mart.

Activity Log:
===== State: Ready_for_Approval by:lphillips at 9/3/2002 2:19:43 PM =====

Reassigned to Al
===== State: Assigned by:tliu at 8/1/02 10:54:08 AM =====

The setting has been applied to test project, needs to apply to production this Sunday (8/4/2002).

ID: MPOps00000239
Title: Benson Clark's Password

State: Closed
Open: 7/26/2002 1:50:02PM
Requestor: Mark Mandrella, 202-962-0721

Priority: 1. High
Target Date:

Assigned to: Mark Mandrella, 202-962-0721

Description:
Benson Clark in the NY Region called last night wanting his password reset.

Activity Log:

===== State: Opened by:mmandrella at 7/26/02 9:52:24 AM =====

Called Benson about the password; got voicemail and left a message

ID: MPOps00000240
Title: Changes to LSC Report

State: Closed
Open: 7/26/2002 2:01:02PM
Requestor: Susan Haenel-Beck, 917-767-6435

Priority: 2. Medium
Target Date: 8/19/2002 4:00:00A

Assigned to: Al Bradley, 202-962-0661

Description:
As per the DMIT group conference call yesterday, please make the following changes to the lender scorecard (LSC) report and underlying reports.

1. The underlying reports should be renamed to correspond to the LSC
element being measured. For example, SI #1 Portfolio Characterics should be the name of the report on the LSC for the scorecard
indicator (SI) number one. As this is only a report used on lenders, the "lender" in the report title can be removed as it is repetitious and we might need the space.
2. The LSC report should have a column added to show the actual result
that determined the rating.
3. Both the Scorecard Dictionary Report and the report ranking lenders by volume should be hidden and only available as an
aid within the LSC reports.

Let me know if you have any
questions.

Activity Log:
===== State: Ready_for_Approval by:tliu at 8/14/02 10:45:49 AM =====

All 3 change requests have been applied to the LSC on dev project. Need user to approve them before migrating them to test and then production. Will discuss it on DMIT group meeting 8/14/02.
===== State: Assigned by:tliu at 8/7/02 2:08:03 PM =====

Got clarification in DMIT meeting: should only display numeric data and leave other score items blank.

===== State: Needs_Clarification by:tliu at 8/7/02 11:36:16 AM =====

#3 has been applied to production and dev/test projects. Needs clarification on #2: For non-numerica criteria, e.g., Lender Reivew and Lender Audit, what shall we put there?

ID: MPOps00000241
Title: Issues with DM Report from Release 2 - PEPS

State: Closed
Priority: 1. High
Open: 7/26/2002 2:05:23PM
Target Date: 8/5/2002 4:00:00AM
Requestor: Susan Haenel-Beck, 917-767-6435
Assigned to: Lisa Phillips, 202-962-0724

Description:
There are a number of issues with regard to the PEPS reports. The Lender Program Review Results (1.1.14), Lender Program Review Summary (1.1.14) and Lender Program Review Deficiency (1.1.14.a) are combined into one report.

There seem to be three issues:

1. Scope codes are duplicated (i.e., scope code of 9 shows 18, scope code of 5 shows 10)
2. Liabilities are 4 times higher (i.e., liability of 1,000 is showing as 4,000)
3. Data is not updated regularly (need to get on regular schedules to make viable)

The LID used is 807745 out of NY. When you get to the report, let me know if I can assist you.

Activity Log:

===== State: Closed by:lphillips at 8/12/02 2:11:29 PM =====

Have loaded data successfully into TEST and DEV. All duplicates are removed. PROD and TEST is now in sync.

===== State: Assigned by:shaenel-beck at 8/7/02 4:08:28 PM =====

Have reviewed the report. All data reported in correct amounts.

===== State: Assigned by:tliu at 8/6/02 12:55:54 PM =====

The production data has been corrected, but the test warehouse still contains duplicate records.

===== State: Assigned by:tliu at 8/1/02 11:01:11 AM =====

Not only for F_LNDR_RVW and F_LNDR_RVW_DFCNCY tables, the other two PEPS tables F_LNDR_AUDIT and F_LNDR_AUDIT_DFCNCY
have the same problem. Called and sent email to PEPS DBA Sam Dejone to verify that PEPS is sending us complete data set rather than updated data every monthly load. We need to truncate the four fact tables before loading new data every time. But for test project, since we have dummy data in those tables, we need to add a conditional truncating command to delete records with the ID greater or equal than 0 (because all dummy data have primary key defined as negative number).

===== State: Assigned by:lphillips at 7/30/02 10:35:24 AM =====

It seems the same data were loaded into the table F_LNDR_RVW and F_LNDR_RVW_DFCNCY twice. Need to check on the Informatica loading process.

ID: MPOps00000242 **Title:** Reset Anthony Lowery's Password

State: Closed **Priority:** High
Open: 7/29/2002 2:03:35PM **Target Date:** 7/29/2002 4:00:00A
Requestor: Willie Sutton, 202-377-3320
Assigned to: Mark Mandrella, 202-962-0721

Description:
Please reset the production FPDM access password for:

NAME: Anthony Lowery
USERID: epalowery
PHONE: 415-556-4106
EMAIL: anthony.lowery@ed.gov

Activity Log:

===== State: Opened by:mmandrella at 7/29/02 10:05:05 AM =====

reset password to expire in 90 days.

ID: MPOps00000243 **Title:** Duplicate Data in GA Subrogated Loan Candidate Rpt

State: Closed **Priority:** 2. Medium
Open: 7/29/2002 6:05:18PM **Target Date:**
Requestor: Martha Shine, 312-886-8760
Assigned to: Mark Mandrella, 202-962-0721

Description:
I tested the GA Subrogated Loan Candidate report using three GA IDs (717, 755, & 800). The three user ids and passwords worked and each ga id pulled the same data from the data mart into a report. This report is in production and the guarantor viewing access for this report is "N=No data". Yet, when I printed the reports for each ga id the copies showed the same data and changed ga ids to 500, 50l, 502, and 503 and ga name changed to Washington, DC on DCS - Reg 0, 1, 2, & 3 for the U. S. Department of Education. Is this dummy data?

Activity Log:

===== State: Closed by:mmandrella at 8/12/02 2:36:41 PM =====

Closed the SIR after discussing with Martha. The GA's should not be accessing the report she lists; and her problems with the

GA ID's have been resolved.

===== State: Assigned by:mmandrella at 8/12/02 10:27:12 AM =====

Response from Martha: I am unable to get GAtest755 and 800 to work. GAtest 717 worked but I cannot compare it to the other two IDs.

===== State: Assigned by:mmandrella at 8/5/02 9:30:52 AM =====

Emailed Martha to see if her server problems and user ID's now work OK, and there is no longer a problem with duplicate data.

===== State: Opened by:mmandrella at 7/29/02 2:08:12 PM =====

Ran Report with 3 ID's and did not get same data like Martha Shine did.

ID: MPOps00000244 **Title:** Reset Rao Palagummi's Password

State: Closed **Priority:** High
Open: 7/30/2002 12:17:14P **Target Date:**
Requestor: Willie Sutton, 202-377-3320
Assigned to: Mark Mandrella, 202-962-0721

Description:
Please reset the production FP Data Mart access password for:

NAME: Rao Palagummi
USERID: eprpalagummi
PHONE: 415-556-4111
EMAIL: rao.palagummi@ed.gov

Activity Log:

ID: MPOps00000252 **Title:** 1.5.2 GA VFA Weekly Report

State: Closed **Priority:** 2. Medium
Open: 7/30/2002 7:27:36PM **Target Date:** 9/9/2002 4:00:00AM
Requestor: Ben Chiu, 415-556-4136
Assigned to: Mark Mandrella, 202-962-0721

Description:
For GA 725, Week 4/1/01 to 4/7/01, the value for SR-1-D and SR-1-E are reversed between Data Mart and FMS.Data Mart shows $32,726.93 for SR-1-D and zero for SR-1-E. FMS shows zero for SR-1-D and $32,726.93 for SR-1-E.

Activity Log:

===== State: Needs_Clarification by:mmandrella at 8/14/02 9:13:21 AM =====

Will be getting an update from FMS regarding the report status on 8/15. FMS reports were more complex to run than initially
thought.

===== State: Needs_Clarification by:mmandrella at 8/13/02 9:49:45 AM =====

Requested reports from FMS so we can analyze how the data is coming into the FP datamart and to look for any problems in the process.

===== State: Needs_Clarification by:tliu at 8/12/02 3:35:49 PM =====

Reassigned to Mark.

===== State: Needs_Clarification by:tliu at 8/7/02 11:53:55 AM =====

Please provide the corresponding FMS report name.

===== State: Assigned by:tliu at 8/5/02 10:39:39 AM =====

Needs to contact FMS VFA resource for those manual data.

ID: MPOps00000253 **Title:** 1.2.6 GA Fee Payments

State: Assigned **Priority:** 2. Medium
Open: 7/30/2002 7:29:17PM **Target Date:** 9/9/2002 4:00:00AM
Requestor: Ben Chiu, 415-556-4136
Assigned to: Mark Mandrella, 202-962-0721

Description:
Portfolio balances, Paid AMF and Paid LPIF do not match Form 2000. One reason is the last payment is made after the fiscal year. For example, 4th QTR AMF was paid in 1st quarter of the next FY. Also for FY 2001, it look like all AMF and LPIF payments were made via Manual invoices in January and did not show up as AMIF or LPIF payments in FMS.

No VFA fees are shown for any of the VFA GA's for 2001. The CSAC VFA Fee looks like it was paid via a manual invoice in FMS.

Activity Log:

===== State: Assigned by:mmandrella at 10/1/02 4:27:29 PM =====

Sent Nettie Harding a list of attributes and facts retrieved from FMS to use in FMS-related reports. She will discuss the FMS processes with FMS people.

===== State: Assigned by:smcconaghie at 9/17/02 12:41:53 PM =====

9/17/02 (S. McConaghie) - Will use Invoice Dates instead of Pay Dates for reports. Will need to work w/FMS to get invoice dates on data feeds.

===== State: Assigned by:tliu at 8/23/02 3:27:02 PM =====

Reassigned to Mark.

===== State: Assigned by:tliu at 8/23/02 11:53:33 AM =====

Verified the Portfolio balance and it seems working fine. Communicated via email with Ben Chiu:

I checked GA 706 for FY01, it seems they add up the same, the value is: $325,031,666.

Can you please verify it again and let me know what difference you found?

Thanks
Tina

--- "Chiu, Ben" <Ben.Chiu@ed.gov> wrote:
> Hi Tina
>
> I agree. It should be the same as adding the
> Federal, Operating and
> Restricted funds ending balances from the annual
> report to get the
> portofolio balance. I believe I used GA706 when I
> checked the figures.
>
> Ben
>
> -----Original Message-----
> From: Tina Liu [mailto:sli_tina@yahoo.com]
> Sent: Thursday, August 22, 2002 10:57 AM
> To: ben.chiu@ed.gov
> Cc: Mark Mandrella; Al Bradley
> Subject: GA Fee Payments: Portfolio balances
>
>
> Hi Ben,
>
> Thank you for attending the meeting today. I
> checked the calculation of Portfolio balances in the
> report <GA Fee Payments>, it seems it should be the
> same as adding up principal, interest, and other
> ending balances all together from Form 2000 annual
> report. Can you give us an example GA ID for this
> problem?
>
> Thanks
> Tina

===== State: Assigned by:tliu at 8/23/02 11:52:12 AM =====

Had meeting with FMS and Ben Chiu, sent out a note after the meeting to get more information from FMS:

1. We need to use INVOICE_NUM from table
ap_invoices_all to aggregate on requested and paid
fees for a specific fiscal year. Can FMS send us the
exact format of INVOICE_NUM for all types of invoices?

2. How FMS determine the actual invoice type (VFA,
LPIF, AMF, etc.) for a manual invoice entry?

3. What is the relationship between table

ffelga_soa_reports and ap_invoice_payments_all?
Suppose we add up all types of payments for an
individual GA during fiscal year 2001 from table
ap_invoice_payments_all, can we get the same amount
from table ffelga_soa_reports?

===== State: Assigned by:tliu at 8/13/02 2:35:08 PM =====

Mark sent out email asking for the report spreadsheet from FMS.

===== State: Assigned by:tliu at 8/7/02 11:55:44 AM =====

The FMS developer Prasanth Kundapur sent the SQL statements behind the scene.

===== State: Assigned by:tliu at 8/5/02 10:45:00 AM =====

Called FMS DBA Marcus and sent email to Todd Kaywood on 8/2/02, asking for SQL query behind generating the following
FMS reports (quote from Ben Chiu's email):

>For Total Fees Paid, I ran the "SFA GA SOA Detail Report". For the AMF and LPIF payments, I ran "SFA GA SOA NSLDS AMF Detailed Report" and "SFA GA SOA NSLDS LPIF Detailed Report".

ID: MPOps00000254

Title: 1.2.6.1 GA Requested and Paid Fees

State: Assigned

Priority: 2. Medium

Open: 7/30/2002 7:30:32PM

Target Date: 9/9/2002 4:00:00AM

Requestor: Ben Chiu, 415-556-4136

Assigned to: Mark Mandrella, 202-962-0721

Description:

All three tested GAs show a manual paid invoice on 1/16/01. These figures look like an AMF payments. No entry for VFA fees. Checked all 4 VFAs. All but CSAC had weekly Paid Manual Invoices which probably is their Weekly Claim Payments Process. CSACs VFA fee looks like it showed up on 12/21/01 as a manual Paid Invoice.

the Requested AMF is inaccurate since it matches Paid AMF which we know is wrong. Requested LPIF does not match FMS Annual Report.

Ben McPherson also logged a request regarding this same report. Now combine them together. He said the payment was calculated in the year paid not the year earned.

Activity Log:

===== State: Assigned by:mmandrella at 10/1/02 4:26:57 PM =====

Sent Nettie Harding a list of attributes and facts retrieved from FMS to use in FMS-related reports. She will discuss the FMS processes with FMS people.

===== State: Assigned by:smcconaghie at 9/17/02 12:42:12 PM =====

9/17/02 (S. McConaghie) - Will use Invoice Dates instead of Pay Dates for reports. Will need to work w/FMS to get invoice dates on data feeds.

===== State: Assigned by:tliu at 8/23/02 3:27:52 PM =====

Reassigned to Mark.

===== State: Needs_Clarification by:tliu at 8/12/02 2:24:00 PM =====

Updated the description with Ben McPherson's comments.

===== State: Needs_Clarification by:tliu at 8/7/02 11:03:09 AM =====

Please provide detailed information about the mismatching data. For example, the actual dollar amount difference between the
FMS report(s) and the data mart report.

===== State: Needs_Clarification by:tliu at 8/2/02 10:42:23 AM =====

Checked the SR_F_GA_INVOICES table and found out that all requested and paid AMF fees match each other. Needs to call Ben
Chiu to clarify how to calculate the requested and paid fees, specifically grouping on what time attribute (right now, both are aggregated based on invoice date).

ID: MPOps00000255 **Title:** 1.2.7 GA Fee Payments History Report

State: Assigned **Priority:** 2. Medium
Open: 7/30/2002 7:32:26PM **Target Date:** 9/9/2002 4:00:00AM
Requestor: Ben Chiu, 415-556-4136
Assigned to: Mark Mandrella, 202-962-0721

Description:
All three tested GAs show a manual paid invoice on 1/16/01. These figures look like an AMF payments. No entry for VFA fees. Checked all 4 VFAs. All but CSAC had weekly Paid Manual Invoices which probably is their Weekly Claim Payments Process. CSACs VFA fee looks like it showed up on 12/21/01 as a manual Paid Invoice.

the Total Fees Paid does not match FMS (added all monthly SOAs for GA 706 FY-2001).

Activity Log:

===== State: Assigned by:mmandrella at 10/1/02 4:26:21 PM =====

Sent Nettie Harding a list of attributes and facts retrieved from FMS to use in FMS-related reports. She will discuss the FMS processes with FMS people.

===== State: Assigned by:smcconaghie at 9/17/02 12:42:30 PM =====

9/17/02 (S. McConaghie) - Will use Invoice Dates instead of Pay Dates for reports. Will need to work w/FMS to get invoice dates on data feeds.

===== State: Assigned by:tliu at 8/23/02 3:30:31 PM =====

Reassigned to Mark.

ID: MPOps00000256 **Title:** Reset FPDM Access Password for E. Bundy

State: Closed **Priority:** High
Open: 7/31/2002 1:46:04PM **Target Date:**
Requestor: Willie Sutton, 202-377-3320
Assigned to: Mark Mandrella, 202-962-0721

Description:
Please reset the production FP Data Mart access password for:

NAME: Emanuel Bundy

USERID: enebundy

PHONE: 202-377-3316

EMAIL: emanuel.bundy@ed.gov

Activity Log:

ID: MPOps00000259 **Title:** Drill to multiple templates in report - E32

State: Postponed **Priority:** 3. Low
Open: 7/28/2001 4:03:57PM **Target Date:**
Requestor: Susan Haenel-Beck, 917-767-6435
Assigned to: Tina Liu, 202-962-0726

Description:
Drill to multiple templates for "Consolidation Load Fee Payment Analysis Report

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:06:13 PM =====

8/21/2001 (Annie Barton) Waiting for new release of Microstrategy

8/22/2001 (Keisha Contee) Our Microstrategy Case #137013 for this enhancement has been logged as an enhancement (Log id 127716) on the Microstrategy Side. We need to wait for a release that states, 127716 has been fixed.

11/29/01 (Bob Audet) Called MicroStrategy Technical Services to verify the status of the enhancement. Currently not fix date has been determined by MicroStrategy Technology. Estimated time would be Q2 2002, second release of 7.2. Reassigned to Robert Audet.

1/2/2002 (Tina Liu) Reassigned to Tina

1/22/2002 (Tina Liu) Discussed with Ahmad and he suggested to put the request type to Enhancement because we do not know if the Phase II will be using MSTR 7.2 or not.

ID: MPOps00000260 **Title:** Data Mart users lose access when NT patches are in

State: Postponed
Open: 7/18/2001 4:19:05PM
Requestor: Lisa Phillips, 202-962-0724
Priority: 3. Low
Target Date:
Assigned to: Tina Liu, 202-962-0726

Description:
Data Mart users lose access to Microstrategy reports when patches are installed on the NT server.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:20:25 PM =====

7/18/2001 (Keisha Contee) Annie logged problem on the Microstrategy web site. Microstrategy suggested we upgrade to version 7.1.1 and the problem would be resolved. We are currently running version 7.1.1. Annie will continue to investigate the issue.

11/26/01 (Bob Audet) We tried to add groups in 2-tier mode with server down. Still does not work. Reassigned to Bob.

12/14/01 (Bob Audet) Recommend further research. May want to postpone until next upgrade at DOE.

1/2/2002 (Tina Liu) Reassigned to Tina.

1/3/2002 (Tina Liu) Reassigned to Mark.

1/23/2002 (Tina Liu) Reassigned to Tina.

ID: MPOps00000261
Title: Page-by area not working as expected

State: Postponed
Open: 6/4/2001 4:21:54PM
Requestor: Tina Liu, 202-962-0726
Priority: 2. Medium
Target Date:
Assigned to:

Description:
This was logged as a problem with MicroStrategy. The MicroStrategy case number is: 130845. During testing, we fixed the report that had the problem, however there is the possibility that a user may modify their version of a report to re-create this problem.

Activity Log:

ID: MPOps00000262
Title: Search for Lender by name

State: Postponed
Open: 6/4/2001 4:25:18PM
Requestor: Tina Liu, 202-962-0726
Priority: 1. High
Target Date:
Assigned to: Tina Liu, 202-962-0726

Description:
The users wanted to be able to lookup by a lender name instead of a lender id. Annie put in most of the ability to do this, but then ran into a problem with MicroStrategy. She logged a MicroStrategy case number: 128596. Annie was able to allow a user to lookup a lender by typing in a one-word name, but the problem comes in when

trying to search when multiple words are given.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:26:21 PM =====

6/7/2001 (Annie Barton) Paul requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

7/10/2001 (Annie Barton) Defect in Microstrategy. Need to wait for new release to fix the problem.

8/4/2001(Annie Barton) Susan Haenel-Beck requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

11/29/01 (Bob Audet) Called MicroStrategy Technical Support and they fixed confirmed the issue for release 7.2 Beta 1. I recommend that we wait until general availability of 7.2 in Q1 of 2002.

1/2/2002 (Tina Liu) Reassigned to Tina.

ID: MPOps00000263

Title: Login before projects are displayed

State: Postponed

Priority: 1. High

Open: 9/6/2001 4:26:34PM

Target Date:

Requestor: Tina Liu, 202-962-0726

Assigned to: Tina Liu, 202-962-0726

Description:
For security purposes it is better if the user logs in first and then chooses the appropriate project. This method will only display the projects the user can access. With situation, when the users' password expires, they are not prompted to change it and locked out of the project.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:27:42 PM =====

9/6/2001 (Annie Barton) Awaiting a new release in Microstrategy to implement this new procedure.

11/26/2001 (Bob Audet) This issue is linked to issue #229, Assigned to Bob.

11/29/01 (Bob Audet) Emailed the FP Power Users to decide if this issue should be closed since a workaround from Issue #229 was provided and the issue subsequently closed.

12/03/01 (Bob Audet) Moved to 'Needs Clarification' because the FP Power Users need to decide whether this issue can be closed since it is similar to Issue #229 that was closed.

1/2/2002 (Tina Liu) Reassigned to Tina.

1/11/2002 (Tina Liu) Sent email to Nettie Harding for action update.

1/18/2002 (Tina Liu) called Nettie to clarify the status and then called Tech support, logging two issues: 155688 for desktop password expiration reminder and 155689 for web login twice. Tech support for issue 155689 provided a resolution: log in as Administrator, click on a project -> preferences -> Project defaults -> Project display and change the Project list selection from "Show all the projects connected to the Web Server before the user logs in" to "Log in, then show the projects accessible by the supplied login". This setting will not hold after user logs out and then relogin after a while. Reset the target date to 2/1/2002.

1/22/02 (Tina Liu): The preference setting on production server was actually successful after rechecking it today. But the dev web server reported error: "'Error Saving Personal Preferences. Your project default preferences could not be saved. Your permissions on the Web folder or in its contents may be incorrect". MSTR Tech Support provided two tech notes "TN5600-7X0-0304" and :N5600-7X0-0142" to tackle this issue. Sent email to Benson Hwang for the security property setting of file AdminOptions.xml on dev server. Benson changed the setting to allow changes, now it works on dev server as well.

1/29/02 (Tina Liu): The login and projects setting works fine with MSTR Web 7.1.2 version but is not stable for the 7.1 version. For the password expiration problem, MSTR Tech support is still investigating on it. For now, run scripts in MSTR Command center to gather user profiles and run a java program accenture.modpartner.datamart.FileTransform to change the format of the user profile files to be sorted in ascending order based on the password expiration time and put properties of the same user into one row, which may later be exported to an Excel file and sent to Willie Sutton. The first file generated on today has already been sent to Willie to review.

1/30/2002 (Tina Liu): MSTR Tech Support sent email confirming that the password expiration problem has been fixed for MSTR Web release 7.2, which is scheduled to come in late Q1/2002 or early Q2/2002. Change the status to be postponed until the next upgrade to MSTR 7.2.

2/11/2002 (Tina Liu): Figured out the unstable setting problem is indeed a dual-web server issue. When the setting was changed, it was only applied to one of the web servers, this is why we may observe different behavior for the default page. Set to use "Login.asp" for both web servers. The password expiration problem will still occur. Needs to remind users to use "Projects.asp" to change password when it is reset by the administrator to force change of password at next login.

ID: MPOps00000264 **Title:** Subtotals appearing at top of Report

State: Postponed **Priority:** 3. Low
Open: 2/21/2002 5:28:10PM **Target Date:**
Requestor: Susan Haenel-Beck, 917-767-6435
Assigned to: Lisa Phillips, 202-962-0724

Description:
When running the Part II and Part III reports from the web the totals are displayed at the bottom of each lender. When moving the "Quarter Ending Date" from the columns to rows, the subtotals now appear at the top of each lender.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:31:00 PM =====

2/21 (LP): In a meeting with the power users it was discussed that we move the Qtrs from the column to the rows in template to fix the problem.

2/21(LP): Could not move the Qtrs from the column to rows. Error still occurs. This is a problem with MSTR 7.1 but has been identified for the next release: This note is from their support site:

Defects and enhancements addressed in MicroStrategy 7 7.1.3
MicroStrategy Agent 7.1.1 TS Case 141024 Subtotals are always displayed at the top if attributes are sorted

ID: MPOps00000265 **Title:** We need to use dynamic quarter prompts

State: Postponed **Priority:** 3. Low
Open: 2/22/2002 5:31:04PM **Target Date:**
Requestor: Tina Liu, 202-962-0726
Assigned to: Tina Liu, 202-962-0726

Description:
Some quarter prompts in FP data mart use a pre-selected element list with the ending quarter of September 2001 (or December 2001) should be changed to be dynamic prompts that will include only those valid quarters that appear in the related fact source table(s).

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:32:08 PM =====

2/22/2002 (Tina Liu): Opened the issue and assigned to Tina. This is postponed due to a bug with MicroStrategy Web 7.1 (it does not support set qualification type of filter). Should be fixed in 7i release on March-April time

ID: MPOps00000266 **Title:** No Limit for login attempts

State: Postponed **Priority:** 3. Low
Open: 3/4/2002 5:32:12PM **Target Date:**
Requestor: Tina Liu, 202-962-0726
Assigned to: Tina Liu, 202-962-0726

Description:
There is no limit to the number of invalid access attempts that may occur for a given user on the CMDM (or any datamart).

Case entered with Microstrategy (#160279)

Activity Log:

ID: MPOps00000267 **Title:** Correct/add parent Lender name, city and state

State: Postponed **Priority:** 2. Medium
Open: 6/3/2002 4:33:40PM **Target Date:**
Requestor: Nettie Harding, 202-377-3307
Assigned to: Tina Liu, 202-962-0726

Description:
This SIR is related to SIR 291. We need to use the table sent by Nettie to add/correct parent lender name, city and state information so that they can be used for SIR 291-related reports.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:34:51 PM =====

6/25/02 (T.Liu): Parent names have been corrected. Need more work on city and state information. Since our

ID: MPOps00000268 **Title:** Automated Report to check for GA Access Violation

State: Postponed
Open: 6/17/2002 4:35:03PM
Requestor: Tina Liu, 202-962-0726
Priority: 2. Medium
Target Date:
Assigned to: Tina Liu, 202-962-0726

Description:
Schedule an automated report that will indicate if GA user access (GA users can see only their own GA's data) has been broken. The report should run at least once a week, possibly every day. Use Microstrategy alert feature if it is available in the next release.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:36:13 PM =====

7/15/02 (T.Liu): Has not found any easy solution to this request. It is not supported by current or new version of MSTR. Postponed for now.

ID: MPOps00000269
Title: Drilling Problem

State: Postponed
Open: 7/15/2002 4:53:25PM
Requestor: Tina Liu, 202-962-0726
Priority: 1. High
Target Date:
Assigned to: Tina Liu, 202-962-0726

Description:
MicroStrategy web 7.1 does not take drilling setting from report. In order to allow users to drill from Lender Scorecard summary report to individual lender scorecard report, we have to set web drilling setting to "allow drilling everywhere". Under this setting, users will be able to drill to some areas that should not be exposed to users or users will get server error when trying to drill. An example problem is for the report "Lender ED 799 Late". When user tried to drill on the metric, he got a new metric called "Max FQ Ending Date" in Julia format. We should never allow users to see this metric.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:54:34 PM =====

7/15/02 (T.Liu): Opened the SIR. Since it is an known bug for web 7.1. We will need to revisit this issue after installing 7i.

ID: MPOps00000270
Title: Issues with GA Requested and Paid Fees

State: Closed
Open: 7/31/2002 7:01:45PM
Requestor: Ben McPherson, 214-880-3083
Priority: 2. Medium
Target Date: 8/19/2002 4:00:00A
Assigned to: Tina Liu, 202-962-0726

Description:
1.2.6.1 GA Requested and Paid Fees
DataMart shows payments in yr paid not when earned One of the initial drop downs has info for years 1996-2000 but there is
no info for these years

Activity Log:
===== State: Ready_for_Approval by:tliu at 8/5/02 10:33:12 AM =====

This one has been changed and also migrated to production on 8/4/02.

ID: MPOps00000272 **Title:** FP release 2 data load problem

State: Closed **Priority:** 1. High
Open: 8/6/2002 4:56:06PM **Target Date:**
Requestor: Tina Liu, 202-962-0726

Assigned to: Lisa Phillips, 202-962-0724

Description:
We need to deal with the following problems:

1. Reload NSLDS data because we have two loads in the same month that would try to go into the same table partition.
2. No data was sent from FMS.
3. Needs to truncate FMS and PEPS fact tables before loading new data.
4. Needs to load to all three environments (dev, test, and production) automatically.
5. Needs to keep dummy data in separate tables on test project and manual data in separate tables for all three environments.

Activity Log:

===== State: Closed by:lphillips at 8/20/2002 1:26:49 PM =====

Dorothy has created DB Link from our PROD to our DEV/TEST. Before the next FMS batch load is run in Informatica, a script
must be run to create the link and update the tables. Dorothy has updated so that all tables are in sync for FMS Dev/Test/Prod.

===== State: Assigned by:lphillips at 8/13/02 2:35:20 PM =====

All data has been correctly loaded into TEST, DEV, and PROD for PEPS and NSLDS. FMS has been correcltly loaded into PROD
only. Awaiting feed from FMS for TEST/DEV environment. We will meet tomorrow (8/14) to discuss with DBAs. The FMS data
does not need to be truncated- although a snapshot it given of current data each month, previous months data is kept and loaded
prior to loading any new data. We believe this to be correct. Updated mappings and sessions for PEPS have been created to
load Test Data after all data has been loaded into the Test Environment for the month.

ID: MPOps00000273 **Title:** Force users to change passwords

State: Closed **Priority:** 1. High
Open: 8/6/2002 5:02:48PM **Target Date:** 8/26/2002 12:00:00P
Requestor: Willie Sutton, 202-377-3320

Assigned to: Mark Mandrella, 202-962-0721

Description:
Force all FP users to change passwords in dev/test and production environments.

Activity Log:

===== State: Assigned by:mmandrella at 8/16/02 10:06:18 AM =====

Password change postponed until Sunday 8/25. Reason is the Power Users will be in DC the week of the 19th and will be unavailable to assist their web users in problems they will have with the password change.

===== State: Assigned by:mmandrella at 8/12/02 11:09:19 AM =====

The plan is to set all the users to be forced to change their passwords on Sunday, 8/18 during the normal CR. So, starting on Monday morning users logging in will have to change their passwords. Notified Willie Sutton about the plans to see if he has
any objections.

ID: MPOps00000280 **Title:** James Foley wants ID for Guarantor

State: Closed **Priority:** 1. High
Open: 8/16/2002 2:44:40PM **Target Date:** 9/9/2002 4:00:00AM
Requestor: Mark Mandrella, 202-962-0721
Assigned to: Mark Mandrella, 202-962-0721

Description:
James Foley called with a request to get an ID for Theresa Gervasio of the New Jersey Guaranty Agency.

Activity Log:

===== State: Closed by:mmandrella at 8/21/02 9:34:43 AM =====

Closed per Willie Sutton and Susan Haenel-Beck. They are dealing with this issue.

===== State: Opened by:mmandrella at 8/16/02 10:47:10 AM =====

contacted Willie Sutton about how to handle this request (i.e. for Guarantors to get ID's). He responded that he would speak with James and get back to me on how to handle future scenarios.

ID: MPOps00000282 **Title:** Needs to insert manual VFA performance data

State: Assigned **Priority:** 2. Medium
Open: 8/20/2002 5:28:52PM **Target Date:** 9/9/2002 4:00:00AM
Requestor: Lee Harris, 202-377-3097
Assigned to: Al Bradley, 202-962-0661

Description:
We need to have manual data inserted into F_VFA_PERF_RPT_NSLDS and F_VFA_PERF_RPT_FMS to cover the FY 2000-2002. For
FMS, we can get FY2001 and FY2002 data directly through the FMS ICD and Informatica mapping, but the way we calculate the
Collection Recovery Rate field in our data mart is different than what have been used in previous benchmark manual reports.
The difference lies in the usage of MR_27,which is either a monthly or quarterly based field. For NSLDS, data mart only contains data corresponding to the extract date of 7/3/2002 and 7/28/2002. We need to get all the rest of the data from manual
benchmark reports.

Activity Log:

===== State: Assigned by:smcconaghie at 9/17/02 12:47:31 PM =====

9/17/02 (S. McConaghie) - Trigger Rate problem corrected, Collections Recovery Rate being researched.

===== State: Assigned by:tliu at 8/22/02 11:42:03 AM =====

Tried to schedule a meeting on Friday (8/23/02) at 11:00 AM or 1:00PM in Lee's office. Part of NSLDS manual data have been
copy-pasted to a spreadsheet. The following problems still remain:

1. Get data from FMS for FY00
2. MR_27 issue
3. Get data from NSLDS for monthly "Net Guarantee" amount. Currently only quarter amount is available.
4. Get data from NSLDS for fiscal month 7 and 8 of FY02. Currently data mart contains extracts from 7/3/02 and 7/28/02 (need
to verify that they correspond to fiscal month 9 and 10 of FY02).

===== State: Opened by:tliu at 8/20/02 1:39:54 PM =====

Contacted Lee Harris and got a bunch of reference spreadsheet files. Sent email to Gary Hopkins (Gary.Hopkins@ed.gov, 377-3208) asking about the MR_27 issue. Needs to set up a time to meet with him and Lee Harris.

ID: MPOps00000283 **Title:** Add Graphs to FP Rel 2 Reports

State: Assigned **Priority:** 2. Medium
Open: 8/20/2002 6:13:48PM **Target Date:** 9/9/2002 4:00:00AM
Requestor: Lee Harris, 202-377-3097
Assigned to: Mark Mandrella, 202-962-0721

Description:
Lee Harris wants line-graphs included in the GA VFA Performance Measures Reports (both NSLDS and FMS).

The line graphs should mirror the report grids: one line for each GA in the report (706, 725, 748, and 755). Also, one graph should be made for each metric.

I was provided handouts of graphs prepared by KPMG. The reports should mirror these.

Activity Log:

ID: MPOps00000284 **Title:** Alert users about most recent load date

State: Postponed **Priority:** 2. Medium
Open: 8/20/2002 8:33:47PM **Target Date:**
Requestor: Nettie Harding, 202-377-3307
Assigned to:

Description:
Users want to get an alert about the last load date from all four source systems: PEPS, FFEL, NSLDS, and FMS. Currently we have a report <Data Mart Update Information> that is updated every month after FFEL load. We need to get rid of this report
when MSTR 7i is installed and use the alert feature provided by MSTR 7i.

Activity Log:

ID: MPOps00000285 **Title:** New ID's for training needed

State: Closed
Open: 8/21/2002 6:12:49PM
Requestor: Susan Haenel-Beck, 917-767-6435
Priority: 1. High
Target Date: 8/23/2002 4:00:00A
Assigned to: Mark Mandrella, 202-962-0721

Description:
We need to have test IDs for the upcoming external data mart training that are not GA specific. Because of the schedule, Chicago and Atlanta are running at the same time. Let's set up 60 IDs, and we all will share them....that would be 60 for public
access and 60 for GA specific access. All ID's should have the same accesses. This also allows for reserve ID's just in case we need them.

Activity Log:
===== State: Assigned by:mmandrella at 8/22/02 11:25:20 AM =====

Script ran successfully and the ID's are created. I have notified Susan and she needs to call to get the passwords.

===== State: Assigned by:mmandrella at 8/21/02 4:35:39 PM =====

Created the script to create the User ID's (TrainingGA1 - 60 and PublicGA1 - 60). Added the script for the security roles in the DEV roles script.

Clarification from Susan:

The IDs should follow the same format..... Train### and Public###. Each can have a number for 1-60 for each ID. The public should have access to all dummy data associated with dummy GA Code 500. The train ID should have access to lenders corresponding to GA 500 - all GA's should have the same information access for training...

===== State: Assigned by:mmandrella at 8/21/02 2:53:15 PM =====

Clarification from Susan:

The IDs should follow the same format..... Train### and Public###. Each can have a number for 1-60 for each ID. The public should have access to all dummy data associated with dummy GA Code 500. The train ID should have access to lenders corresponding to GA 500 - all GA's should have the same information access for training...

ID: MPOps00000286
Title: Change report location and visibility

State: Closed
Open: 8/22/2002 1:55:21PM
Requestor: Nettie Harding, 202-377-3307
Priority: 1. High
Target Date: 8/26/2002 4:00:00A
Assigned to: Al Bradley, 202-962-0661

Description:
FP DMIT group wants to do the following changes on some reports:

1. Make the folder LEAP/SLEAP invisible to GA users.
2. Move reports "Active Lenders" and "Inactive Lenders" from "Internal Program Statistics" folder to "Lender 799 Reports" and
"Lender 799 Reports (ext)" folders.
3. Make the folder "Internal Program Statistics" invisible to GA users.
4. Disable "Lender Audit Results" report (because it does not have complete data available).

Activity Log:

===== State: Verify_Migration by:tliu at 8/25/02 11:26:00 AM =====

Change has been applied to productions as well.
===== State: Ready_for_Approval by:tliu at 8/22/02 10:32:01 AM =====

Changes have been applied to dev and test projects. Note that since GA users do not have access to dev project, so the security
setting in dev may be slightly different than that of test and production.

ID: MPOps00000287 **Title:** GA Closed School and False Certification Claim

State: Assigned **Priority:** 2. Medium
Open: 8/26/2002 7:11:04PM **Target Date:**
Requestor: Ben Chiu, 415-556-4136
Assigned to: Mark Mandrella, 202-962-0721

Description:
This report shows all closed schools and false cert claims as $0 for all schools for GAs for all time period chosen. Also, this report does not seem to list all the schools for each GA. For example for GA 734 (NJ), the report shows only one school, Rider University. The PEPS database provided by Nettie (Harding) shows there are over 20 schools with a closed school and false cert claim for this GA.

Activity Log:

===== State: Assigned by:lphillips at 8/27/02 1:13:39 PM =====

Have looked into the Data issue and have determined that there is no missing data in the tables. Also recreated Report using the the "Claim Rate" attribute as opposed to the "NSLDS Claim Rate" attribute and data was returned. Could this be the problem? In addition, look into the Claims Paid Incremental Amount metric. This does not seem to be calculating total correctly.

ID: MPOps00000288 **Title:** Amanda Wingo gets Datamart Error

State: Closed **Priority:** 1. High
Open: 8/27/2002 2:22:27PM **Target Date:** 8/28/2002 4:00:00A
Requestor: Willie Sutton, 202-377-3320
Assigned to: Mark Mandrella, 202-962-0721

Description:
Email from Amanda to Willie Sutton

I am getting an error message that "no" microstrategy servers are currently available? Is this just a temporary thing?

Activity Log:

===== State: Assigned by:mmandrella at 8/27/02 11:16:04 AM =====

Emailed Amanda to tell her to close and restart the browser to see if this corrects the problem.

ID: MPOps00000289 **Title:** Reset Linda Elrod's Password

State: Closed **Priority:** 1. High
Open: 8/27/2002 3:40:13PM **Target Date:** 8/27/2002 4:00:00A
Requestor: Willie Sutton, 202-377-3320

Assigned to: Mark Mandrella, 202-962-0721

Description:
Please reset the production FP Data Mart access password for:

NAME: Linda Elrod

USERID: enlelrod

PHONE: 415-556-4100

Activity Log:

ID: MPOps00000290 **Title:** Reset Lee Harris' Password

State: Closed **Priority:** 1. High
Open: 8/27/2002 5:37:40PM **Target Date:** 8/27/2002 4:00:00A
Requestor: Willie Sutton, 202-377-3320
Assigned to: Mark Mandrella, 202-962-0721

Description:
Please reset the production FP Data Mart access password for:

NAME: Lee Harris
USERID: eplharris
PHONE: 202-377-3097

Activity Log:

ID: MPOps00000291 **Title:** Modify Trigger Rate Metrics

State: Assigned **Priority:** 1. High
Open: 8/28/2002 3:36:01PM **Target Date:** 9/8/2002 4:00:00AM
Requestor: Anna Allen, 202-377-3312
Assigned to: Al Bradley, 202-962-0661

Description:
Format metrics as Percentage to 2 decimals.
Change name of Reinsurance Trigger Rate-Periodic to
Reinsurance Trigger Rate-Monthly.
Change monthly metric to pickup value as reported on Periodic graph.
Change FYTD metric to pickup value as reported on Cumulative graph.

Activity Log:

===== State: Assigned by:smcconaghie at 9/17/02 12:48:18 PM =====

9/17/02 (S. McConaghie) - In TEST & ready for PROD.

ID: MPOps00000292 **Title:** Reset Password for Constantino Conte

State: Closed **Priority:** 1. High
Open: 9/6/2002 3:55:30PM **Target Date:**

Requestor: Lisa Phillips, 202-962-0724

Assigned to: Lisa Phillips, 202-962-0724

Description:
Mr. Conte called with problems logging into FP Data Mart.

Activity Log:

===== State: Opened by:lphillips at 9/6/02 11:56:58 AM =====

Constantino,
Try this link.

http://fp-mart.sfa.ed.gov/microstrategy7/Login.asp?Server=SFANT004&Project=Financial+Partners&Port=0&Uid=&UMode=1&Page=&Request=&ErrTitle=&ErrID=&autologin=

If you are still having problems you may also go to:
http://fp-mart.sfa.ed.gov/microstrategy7/Login.asp and click on the "Financial Partners" Link and a login screen should appear.

I have changed your password to: "Password1", user name is "epcconte"

Please let me know if you are having any problems.

Thanks!

Lisa

ID: MPOps00000293

Title: Modify Extract Date Prompt: Maximum of one date

State: Ready_for_Approval
Open: 9/9/2002 3:25:56PM
Requestor: Nettie Harding, 202-377-3307

Priority: 2. Medium
Target Date: 9/23/2002 4:00:00A
Assigned to: Al Bradley, 202-962-0661

Description:
Extract Date Prompt should allow a maximum selection of one of one extract date

Activity Log:

===== State: Ready_for_Approval by:smcconaghie at 9/17/02 12:49:27 PM =====

9/17/02 (S. McConaghie) - Has been verified by Power Users. Ready for PROD.

ID: MPOps00000294

Title: Create Award Year Attribute

State: Ready_for_Approval
Open: 9/9/2002 3:45:10PM
Requestor: Nettie Harding, 202-377-3307

Priority: 2. Medium
Target Date: 9/23/2002 4:00:00A
Assigned to: Al Bradley, 202-962-0661

Description:

Create Attribute that will display award years as follows: 2000 - 2001

Activity Log:
===== State: Assigned by:smcconaghie at 9/17/02 12:50:27 PM =====

9/17/02 (S. McConaghie) - Ready to be migrated to TEST.

ID: MPOps00000296 **Title:** Change Lender Servicer Portfolio Report

State: Ready_for_Approval **Priority:** 2. Medium
Open: 9/10/2002 6:30:39PM **Target Date:** 9/30/2002 4:00:00A
Requestor: Nettie Harding, 202-377-3307
Assigned to: Al Bradley, 202-962-0661

Description:
Change results of Servicer "0" to reflect the lender name. If Servicer = 0 then Lender Names, else lender.

Activity Log:
===== State: Assigned by:smcconaghie at 9/17/02 12:50:48 PM =====

9/17/02 (S. McConaghie) - Ready to be migrated to TEST.

ID: MPOps00000299 **Title:** Modify the Select Quarter prompt

State: Assigned **Priority:** 2. Medium
Open: 9/12/2002 1:41:53PM **Target Date:** 9/22/2002 4:00:00A
Requestor: Nettie Harding, 202-377-3307
Assigned to: Al Bradley, 202-962-0661

Description:
Filter or limit the quarters that appear in the prompt to dates that have fact data.

Activity Log:

===== State: Assigned by:smcconaghie at 9/17/02 12:51:04 PM =====

9/17/02 (S. McConaghie) - Ready to be migrated to TEST.

ID: MPOps00000302 **Title:** Add records to lkp_srvcr

State: Ready_for_Approval **Priority:** 2. Medium
Open: 9/16/2002 6:00:31PM **Target Date:** 9/26/2002 4:00:00A
Requestor: Jerry Wallace, 214-880-3087
Assigned to: Al Bradley, 202-962-0661

Description:
Add servicer records from Jerry Wallace's Servicer List Volumen spreadsheet to the FP datamart table lkp_srvcr.

Activity Log:
===== State: Opened by:abradley at 9/16/02 2:04:11 PM =====

9/16/02 Confirmed that FP lookup table is missing 32 servicer IDs that are contained in the spreadsheet. Add to dev and test
and then migrate to production.

Task Order 110 – FP Data Mart Operations

ID: MPOps00000303 **Title:** Create User ID's

State: Closed **Priority:** 1. High
Open: 9/20/2002 2:35:24PM **Target Date:** 9/20/2002 4:00:00A
Requestor: Willie Sutton, 202-377-3320
Assigned to: Mark Mandrella, 202-962-0721

Description:
Please establish a production FP Data Mart access account for:

(1) NAME: Grebeldinger, Beth

USERID: beth.grebeldinger
EMAIL: beth.grebeldinger@ed.goc
DESCRIPTION: Program Analysis Office, Analysis Enterprise, UCP 093B1, 202-377-4018

(2) NAME: Marroig, Jose A.
USERID: jose.marroig
EMAIL: jose.marroig@ed.gov
DESCRIPTION: Program Analysis Office, UCP 092D2, 202-377-3084

Activity Log: